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ABSTRACT

An analysis of the consequences of state administrative and legislative decisions on levels of appropriations for bilingual education in Illinois is presented. The report first describes existing legislation for bilingual education funding in the state, including legislation specifically for transitional bilingual education and other transitional instructional programs. Next, appropriations and political issues in the funding process are examined, including forces promoting competition among school districts. The report proposes a real cost model estimate based on actual program costs to districts and recommends a dollar funding level. Some state statistics concerning eligible and served populations, funding levels for each fiscal year (FY) since FY 1971, requested and actual FY 1988 appropriations, and total excess cost and projected allocations for FYs 1988 and 1989. The report presents separately all statistics for Chicago and downstate and includes a brief bibliography. (MSE)

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FUNDING BILINGUAL EDUCATION IN ILLINOIS

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Introduction:

Perhaps no one educational movement heralded such a storm of controversy and focus on both national and state levels as bilingual education. The political tempest surrounding this instructional arena is well documented in the research literature of the past two decades (for example, Illinois State Advisory Committee to the U.S. Office of Civil Rights, 1974; Center for Applied Linguistics, 1977; Castellanos, 1983; Medina-Seidner, 1974; Baez and Fernandez, 1987). Developments in bilingual education on the national level have influenced parallel outcomes in individual states, especially with desegregation rulings, funding appropriations, and legislative mandates.

Illinois appeared to reflect the wider arena of events in bilingual education since the inception of Title VII of the Elementary and Secondary Education Act of 1968. Although this first federal Bilingual Education Act provided an appropriation of only $7.5 million for seventy-six basic programs nationwide, it stimulated the development of grass-roots movements in states such as Illinois for mandated programs (Lyons, 1983; Interviews with Medína-Seidner, 1988; Perlman, 1988; and Seelye, 1988). In another turn of events, opponents of bilingual education in

the U. S. Department of Education had attempted in 1981 to influence the levels of appropriations for bilingual education on the federal level with a spurious report on program effectiveness. As a consequence, heated debates and demonstrations characterized the critical hearings of 1982 regarding the Illinois state mandate for bilingual education (Seidner, 1981; Seidner and Seidner, 1983). It would suffice to say that political developments of this nature helped determine the funding levels of bilingual programs in Illinois. It appeared as if the fortunes of bilingual education in Illinois figuratively and literally rose and fell with those on the federal level.

This paper intends to explore some of the consequences of state administrative and legislative decisions as they affected the levels of appropriations for bilingual education in Illinois. We will first turn our attention to the nature of existing legislation for bilingual education funding in the state. This will be followed by an examination of appropriations for the bilingual programs, associated problems, and recommendations.

Governing Legislation:

Transitional Bilingual Education, or TBE, came into existence as the result of an enactment by the Illinois State Legislature in 1976. Prior to this enactment, the Illinois school statutes required instruction in the English language with the exception for vocational schools where, "the pupils... already received the required instruction in English during the current school year." (State of Illinois, 1967, Ch. 122, Sec. 27-2). The Illinois General Assembly appropriated $200,000 to fund an experimental program in five Chicago schools during the 1970-71 fiscal year (in Medina-Seidner, 1980) and continued to appropriate funds for permissive programs during the following five years. By 1973, a Department of Transitional Bilingual Education had been provided by an amendatory enactment of 1973 (State of Illinois, 1973, Ch. 122, Sec. 2-3.39). The mid-1970's witnessed the high-point of funding for federally-subsidized bilingual education programs. In 1976, Illinois became one of four states to specify particular conditions mandating transitional bilingual instructional programs for limited English proficient students (the other states included Pennsylvania, Texas and Massachusetts).

The purpose of the program was to provide limited

English proficient students access to academic subject areas while acquiring English language skills. Both English and the native language of the student would be used as the medium of instruction for target subject areas. TBE programs are mandated in the State of Illinois for twenty or more limited English proficient students of one particular classification (e.g. Spanish, Vietnamese, Lao, etc.). The concentration of these students must occur within one attendance center where TBE instruction will take place (see Ill. State Board of Education,1985, Article 14C-3, p.142).

School districts with less than twenty limited English proficient students in any one target language group may select either TBE or a Transitional Program of Instruction (TPI). This might include English as a Second Language (ESL), with native language reinforcement in academic subject areas, based upon an individual student language assessment. The TBE legislation sets the mandatory limit of three years participation of limited English proficient students in attendance centers with the twenty or more rule. Participation in TBE programs beyond this time period is at the discretion of the individual school district and "and subject to the approval of the student's parents." (Illinois State Board of Education, 1988, Subtitle A, Ch.I, S. 228.30, Subchapter f, 4D).

A total number of 45,339 limited English proficient students received services under the current state mandate during fiscal year 1988. Of this number, approximately 75% of these students received services from the Chicago Public Schools. The remainder were located in 56 downstate districts. Appendix A delineates a numerical breakdown of students receiving either TBE or TPI types of approaches. Hispanics posed the largest percentage by far of these students (76.2%). Other major language groups in rank order include Korean (2.5%), Arabic (2.1%), Polish (1.9%), Vietnamese (1.7%), Cantonese (1.6%), Cambodian (1.4%), Assyrian (1.3%). Some twenty-one language groups with more than 100 students in each are currently receiving TBE instructional services. More than 90 different language groups are represented in TBE and TPI programs. The appropriations provided for bilingual education and problems associated with the nature and level of current funding are discussed in the forthcoming subsection.

Appropriations and Issues:

The General Revenue Fund (GRF) provides the major source of appropriations for state-funded bilingual programs. TBE programs are considered one of nine categorical line items which receive a little over 65% of the GRF program funds (See Illinois State Board of Education, 1987, Table 3). Between the time of the

experimental program in Chicago and the implementation of the 1976 bilingual enactment, the State Legislature appropriated more than $26 million over a progressive five year period to provide services to language minority students. These appropriations were influenced in part by national and local level desegregation actions, especially with the city of Chicago, and the anticipation of mandatory TBE programs which would be in place by July 1, 1976 (Interviews with Medina-Seidner, 1988 and Seelye, 1988).

The 1976 enactment provided a base funding level of $13 million, with Chicago receiving slightly over two thirds of the amount and downstate districts as recipients of the remainder. The high point of funding occurred during the two fiscal years 1986 and 1987; however, compared to the initial mandated funding level, Chicago received 75.4% of the total allocations for $18,523,300 (See Appendix II, based upon Illinois State Board of Education, 1988b unpublished MSS). The current budget allocations for Fiscal Year 1988 were substantially lower than the original requested appropriations (See Appendix III). Essentially, Chicago received 50% of the original request and downstate districts acquired only 24%. Given the number of TBE programs in Chicago, downstate districts were left with a lower percentage rate as reimbursable returns for TPI approaches (interview with Medina-Seidner, 1988).

The low levels of funding posed a serious flaw in providing instructional programs of quality for limited English proficient students in the State. The original premises for entertaining the recommended allocation of more than $42 million emanated from the 1985 amendment to the 1976 authorizing legislation. The amendment expanded the mandate by requiring school districts to provide TPI for groupings of less than 20 eligible students of any one common language (Illinois State Board of Education, 1987). The projected impact of an additional 10,797 students in downstate districts and 3,100 in Chicago who would need services prompted the high level of submission for the 1988 budget.

The politics of this funding as recounted by actual participants is worthwhile to briefly mention at this juncture. The recent submission of educational appropriations by Governor James Thompson appeared to be tied to several issues. For one, the Governor was viewed as opting for an "all or nothing approach" in funding all mandated programs. Accordingly, the submissions were bound to the state income tax increase to produce sufficient levels of funding for the targeted programs. Such levels of

funding would have benefited downstate districts with heavy Republican constituencies. From the perspective of the Chicago schools, they were viewed as benefiting "by putting their money in a general school aid formula rather than categorical funding." (Interview with Perlman, 1988).

The Democratic Speaker of the House, Michael Madigan opposed any increase in the state income tax which would provide new dollars for the Governor to build a "patronage machine," especially in the critical presidential election year. Another issue was the connections between the submissions and the school reform movement. Chicago Democrats were determined to keep the issue of school reform separate from that of the requested appropriations (Interview with Carmen Velasquez, 1988). The existence of a Republican State Superintendent also seemed to be another element in the defeat of the requested appropriations. In fact, the appropriations never came up for a vote. House Speaker Madigan used his prerogative of not calling for a vote and protected the Democrats from being "tainted" by the issue. As one of the activists put it:

> The defeat of the requested appropriations was totally political. Chicago had the biggest voting block. This was the reason for only a 24% level of bilingual funding for downstate districts. Since the Governor paid only "lip service" in passing the requested levels through, not enough Republicans supported it. (Interview with Perlman, 1988).

The remarks also reflect the growing divisiveness and latent animosity between the downstate districts and the Chicago schools. This "us against them" mentality has prevented in many instances a cohesive front in support of a comprehensive state bilingual funding package. Part of the problem originates from the nature of reimbursement provided by Section 14C-12 of The School Code of Illinois. According to the legislation, school districts are reimbursed on the basis of excess costs per pupil. The individual school districts detail their expenses required to operate a bilingual program on a submitted application and then negotiate their particular budgets with state officials.

During the first ten years of the bilingual mandate, the approach seemed to be manageable, given the relatively small numbers of downstate school districts (approximately 60) who were applying for funds. In a sense, the original conception of two separate line items of reimbursement, one for Chicago and the other for downstate districts, had served somewhat of a check against the former devouring the budgetary appropriations of the latter. Still, Chicago received a "set appropriation" this year which came to about $400 per pupil in reimbursed excess costs. In comparison, downstate districts had to compete with one another to

receive a part of this year's appropriation (Interview with Medína-Seidner, 1988).

This competition between districts is heightened by the reality that both Chicago and downstate districts receive only a percentage of their excess costs per student. Competition between downstate districts is conducted on the basis of the largest submitted budget (Illinois State Board of Education, 1988c, Unpublished MSS). The larger the accepted submission, the higher the return the district will receive. Therefore, allowable expenditures depend on the district's request, rather than the number of students or program size.

> A district might have 25 students in need of TBE. The teacher might have a salary of $48,000 a year. Other charges could include fringe benefits, inservice costs, materials, a teacher aide, various pupil services, etc. Total costs might approach $200,000 for this one program (Interview with Medína-Seidner, 1988).

No ceiling presently exists on amounts districts might request. If districts decided upon a high quality program to include bilingual psychologists, counselors, social workers, and aides, in addition to teaching staff, the lower teacher/student ratios and costs could be acceptable under the current definition of reimbursement. In contrast, the expenditures of school districts in minimal compliance with

the law would also be technically acceptable. As a consequence, districts without the monetary resources risk developing weak instructional programs. The majority of downstate districts averaged between $1000 to $3000 in excess costs per student. At the extreme ends, districts requested a reimbursement as low as $50 or as high as $50,000 per student in excess bosts (Ibid.).

The problems associated with the funding of TBE in Illinois are complex, without readily easy solutions in sight. Given this overview of issues, some general observations and recommendations are presented in the concluding section.

Recommendations:

Political climates are as much the realities for bilingual education as for other programs. The current political climate does not favor any move toward increased budget appropriations or a change in the reimbursement procedures. Several "trial balloons" over this past fiscal year appear to validate this observation. The first was the submission of the "doomed" request for a little over $46 million (Illinois State Board of Education, 1987). The se-

cond involved an attempt to amend the current reimbursement process for downstate districts with a new formula based upon computer simulations (State of Illinois, 1988, Unpublished MSS). The legislation was never introduced due to the prevailing political currents.

Assuming that political conditions will change with the passing of the election year with some resolution to the reform issue, the State Board could conceivably find itself in a better situation for submitting a new allocation request. Appendix IV suggests a real cost model estimate based on actual costs to districts of both TBE and TPI programs. A recommended model is presented for Fiscal Year 1990, using the difference of actual numbers submitted by districts and those of projected students in need of services. A 5% cost of living increase added to the projected total per pupil excess cost in Chicago TBE programs came to $827.28, compared to $472.35 per pupil in TPI programs. Students in downstate programs averaged total excess costs of $1237.73 per pupil enrolled in TBE programs and $837 per student in TPI. The 2,444 students in TPI programs reflected only 12% of the downstate districts, compared to a 100% projection for Fiscal Year 1989 (n=12,000).

A total of $26,012,118 would be recommended, given the following rationale:

1. Chicago School District 299 would be prorated at a 55% return of excess costs. This would represent an additional 5% over current levels of funding and probably find support of Chicago Democrats. Given the nature of past funding sycles, it would not be unusual for the growing number of Hispanic constitutents to pressure for this increase. It should be noted that Title IV desegration monies would complement the mandated funds at an estimated rate of 60% of the excess costs, allowing Chicago a surplus of 15% revenues.

2. Downstate school districts would be prorated at a 50% return of excess costs. This would more than double the current percentage of return and benefit all school districts. Moreover, the rate would place downstate districts on parity with Chicago and contribute to a reduction in animosity between the two "geopolitical" areas. Very wealthy and poorer school districts would be given the added incentive of additional revenues to support the budget measure.

3. The submitted allocation would be substantially less than the previously submitted 100% mandated level by the Governor. Downstate budget allocations for combined TBE and TPI programs would more than double any of the appropriations of previous years. Chicago allocations would rise by almost 10% over funding for Fiscal Year 1989. A total of only $7,040,618 above the FY89 appropriation would be needed.

4. Following the presidential election year, it should be a matter of time before the issue of tax revenues will be broached once again. Governor Thompson campaigned before his election with the promise of no additional taxes. House Speaker Madigan capitalized upon this issue when the Governor had submitted his request which tied the funding of educational mandates to a tax increase. It wasn't as if the House Speaker really opposed the tax issue. After all, Madigan had supported Aurelia Pucinski in the campaign bid against Ed Vrydolyak, who opposed the Democratic contender on issues of increasing taxes. It was only that Madigan didn't want to be "tarred by his own brush." The possibility exists that the State Legislature would call for an additional tax increase in support of educational and other programs.

In conclusion, the submission of budgets regarding bilingual education have been largely speculative since the inception of the state mandate and will probably continue to be so. From an educational standpoint, they represent the best estimates of what is needed to carry out instructional programs and the efforts of school districts to meet either minimum standards or to provide the highest possible quality instruction.

From the political perspective, there are known agendas of special interest groups which the budget analyst can take into consideration. Then again, there are the unknown elements of political issues which relegates the science of forecasting to the alchemy of gazing into a crystal ball. One participant in the last attempted submission of increased funding revenues for bilingual education noted:

> The intensity of opposition to the Governor and Superintendent because they were both Republicans was not foreseen. We had underestimated this concern in the election year. (Interview with Perlman, 1988).

There always remains the contention, however, that as these happenings become tomorrow's history, they will provide analysts with an additional platform to study the behavior and reactions of individuals to events.

APPENDIX I

Bilingual Education Program

FY80-88

	CENSUS Students Eligible for Bilingual Education (Column B)	ANNUAL STUDENT REPORT Students served in Bilingual Education Programs			STUDENTS NOT SERVED BY T.B.E.
	Statewide	Chicago	Downstate	Statewide	Statewide
FY80	49,645	35,093	6,873	41,966	7,679
FY81	56,256	28,337	8,691	37,028	19,228
FY82	57,802	30,439	8,187	38,626	19,176
FY83	52,995	28,471	6,386	34,857	18,138
FY84	50,271	25,995	7,250	33,245	17,026
FY85	53,947	29,702	7,619	37,321	16,626
FY86	58,327	34,386	7,946	42,332	15,995
FY87	58,430	34,226	10,179	44,405	14,025
FY88	60,000	33,943	11,396	45,339	14,661

APPENDIX II

STATE FUNDS FOR BILINGUAL EUDCATION IN ILLINOIS

Year	Chicago	Downstate	Total
FY 71	$ 200,000	$ 0	$ 200,000
FY 72	475,000	330,000	805,000
FY 73	1,400,000	970,000	2,370,000
FY 74	3,900,000	2,100,000	6,000,000
FY 75	5,500,000	2,500,000	8,000,000
FY 76	6,000,000	3,000,000	9,000,000
FY 77	9,750,000	3,250,000	13,000,000
FY 78	10,350,000	3,450,000	13,800,000
FY 79	11,000,000	3,600,000	14,600,000
FY 80	12,600,000	4,000,000	16,600,000
FY 81	13,125,000	4,375,000	17,500,000
FY 82	12,675,000	4,225,000	16,900,000
FY 83	12,421,500	4,410,500	16,562,000
FY 84	13,304,500	4,432,000	17,736,500
FY 85	13,304,500	4,432,000	17,736,500
FY 86	13,969,700	4,653,600	18,523,300
FY 87	13,969,700	4,653,600	18,523,300
FY 88	13,480,800	4,490,700	17,971,500
FY 89	13,980,800	4,990,700	18,971,500

APPENDIX III

REQUESTED AND ACTUAL APPROPRIATIONS FOR FY 1988

	Chicago	Downstate	Total
REQUESTED:	$26,634,000	$19,418,300	$46,052,300
ACTUAL:	$13,480,800	$ 4,490,700	$17,971,500

Sources: Illinois State Board of Education, 1987; Illinois State Board of Education, 1988b, Unpublished MSS.

APPENDIX IV

TOTAL EXCESS COSTS AND PROJECTED ALLOCATIONS

I. EXCESS COSTS

	CHICAGO		DOWNSTATE	
	TBE (+20)	TPI (-20)	TBE (+20)	TPI (-20)
FY 88 Costs	$24,806,963	$1,759,494	$10,758,077	$3,353,840
Number of Students	n=29,986	n=3,725	n=8,695	n=2,444
FY 89 Costs	26,047,311	1,847,468	11,295,980	10,044,000
Number of Students	n=32,000	n=4,000	n=9,000	n=12,000

II. PROJECTED SUBMISSION

CHICAGO		DOWNSTATE	
TBE	TPI	TBE	TPI
$14,326,021	$1,016,107	$5,647,990	$5,022,000

Total Chicago: $15,342,128

Total Downstate: $10,660,990

Total Appropriation: $26,012,118

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